

SiteManager **Training Manual**



Module A
Chapter 1

Contract Administration
Contract Records
Correspondence Log

Section A-1-2-11

Creating a Correspondence Log

Student's Version

Indiana Department of Transportation
December 2007, Version 3.7b

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Creating a Correspondence Log

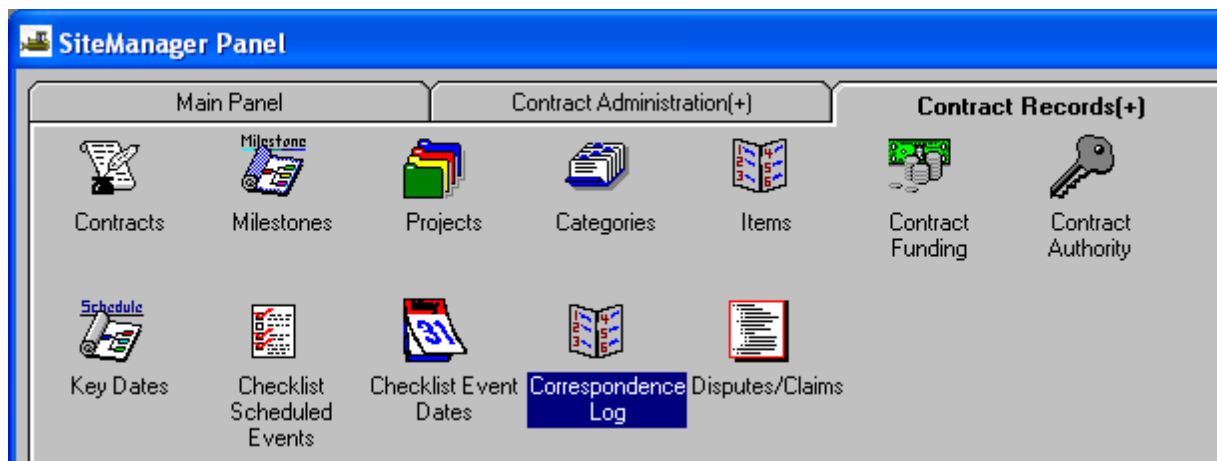
This module explains how to create a correspondence log.



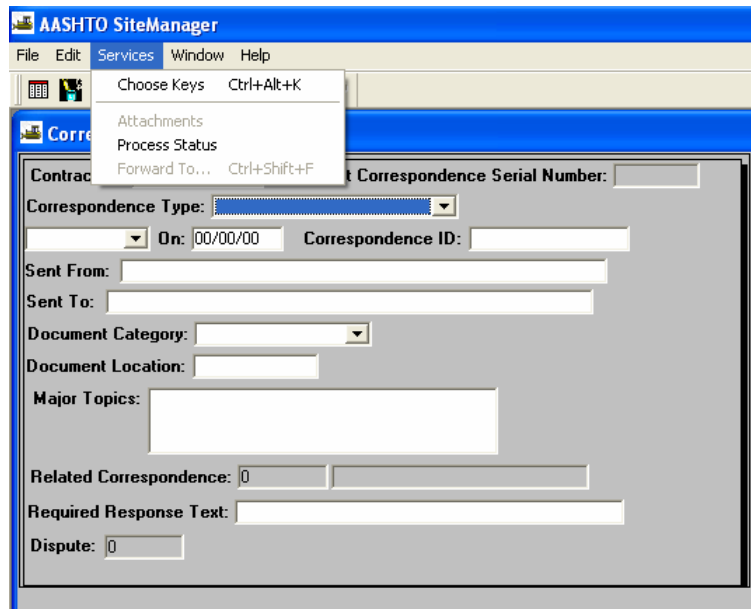
“Double-click” on **Contract Administration (+)** located on the Main Panel.



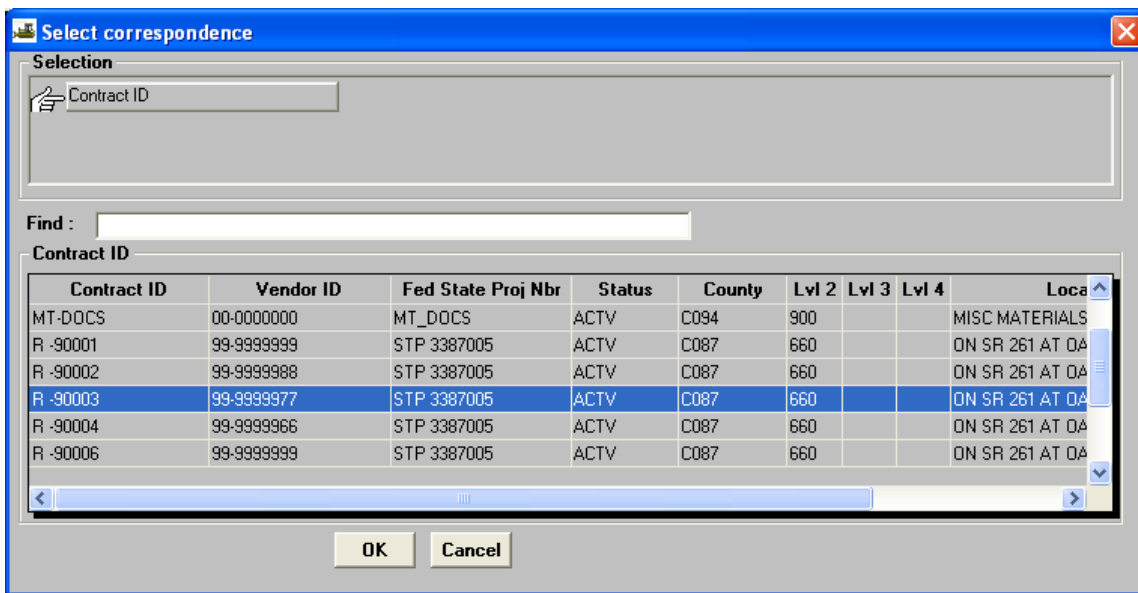
“Double-click” on **Contract Records (+)**.



“Double-click” on **Correspondence Log**.



“Click” on **Services** then “click” on **Choose Keys**.



“Double-click” on the appropriate **Contract ID**.

AASHTO SiteManager
 File Edit Services Window Help

Correspondence Log

Contract ID: R-90003 Contract Correspondence Serial Number:

Correspondence Type:

Sent From:

Sent To:

Document Category:

Document Location:

Major Topics:

Related Correspondence:

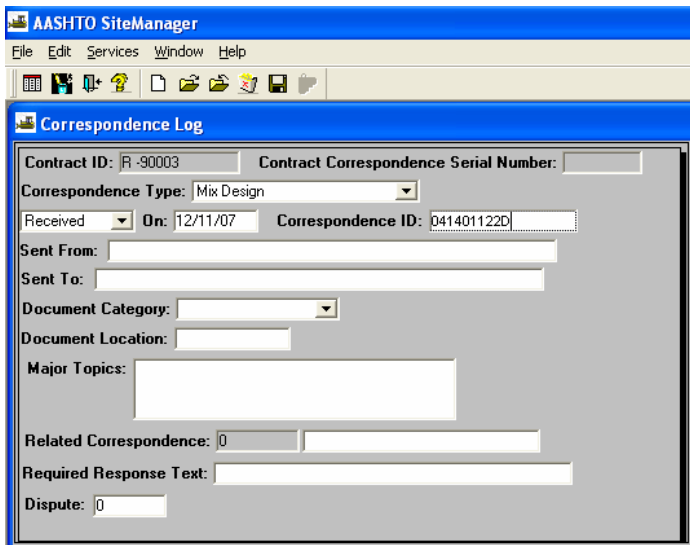
Required Response Text:

Dispute:

Correspondence Type: **Correspondence Type** is a general description of the document. The selections includes;

- Approved Material
- Mix Design
- Permits
- Change Orders
- Pre-letting Questions
- Traffic Control Plan
- Contract Time
- Inspection Report
- Drawing
- Suggestion
- Complaint

“Click” on the appropriate **Correspondence Type** from the drop-down list.



AASHTO SiteManager

File Edit Services Window Help

Correspondence Log

Contract ID: R-90003 Contract Correspondence Serial Number:

Correspondence Type: Mix Design

Received On: 12/11/07 Correspondence ID: 041401122D

Sent From:

Sent To:

Document Category:

Document Location:

Major Topics:

Related Correspondence: 0

Required Response Text:

Dispute: 0

“Click” on the drop-down list located to the left of **On:** and “click” the appropriate selection, **Received** or **Sent**.

On: The **On** field indicates the date the correspondence was received or sent. The date cannot be greater than the current date.

“Enter” the appropriate date in the field located to the right of **On**.

Correspondence ID: The **Correspondence ID** identifies the correspondence log record. The ID consists of the following data:

- SUPERPAVE mix design ID
- PCC mix design ID
- Approval number for Approved Material
- Project Correspondence Serial Number (optional)

“Enter” the identifier in the **Correspondence ID** field.

AASHTO SiteManager
 File Edit Services Window Help

Correspondence Log

Contract ID: R-90003 Contract Correspondence Serial Number:

Correspondence Type: Mix Design

Received: On: 12/11/07 Correspondence ID: 041401122D

Sent From: Black Side Up Paving

Sent To: Greenfield District Testing Lab

Document Category: Superpave Mix Design

Document Location: Other

Major Topics: Superpave Mix Design

Related Correspondence: Traffic Information

Required Response Text:

Dispute: 0

Sent From: **Sent From** is company or agency sending the document. “Enter” the appropriate name in the **Sent From** field.

Sent To: **Sent To** is the name agency receiving the document. “Enter” the appropriate name in the **Sent To** field.

Document Category: **Document Category** further defines the type of correspondence. The selection includes:

- Approved Material
- Concrete Mix Design
- Superpave Mix Design
- Change Orders
- Contract Time
- Contractor
- General
- Other
- Outside Entry
- Permit
- Traffic Information
- Blank

“Click” on the **Document Category** drop-down list and “click” the appropriate selection.

AASHTO SiteManager

File Edit Services Window Help

Correspondence Log

Contract ID: R-90003 Contract Correspondence Serial Number:

Correspondence Type: Mix Design

Received: On: 12/11/07 Correspondence ID: 041401122D

Sent From: Black Side Up Paving

Sent To: Greenfield District Testing Lab

Document Category: Superpave Mix Design

Document Location: Greenfield

Major Topics: HMA Mix Design
401 25.0mm Base

Related Correspondence: 0

Required Response Text:

Dispute: 0

Search
Filter Search
Filter
Find
Sort
Show Filter/ Sort

Document Location: **Document Location** is the stored location of the actual document “Enter” the appropriate location in the **Document Location** field.

Major Topics: **Major Topics** will hold any other information for the subjects of the correspondence.

“Enter” the main subjects of the correspondence in the **Major Topics** field if applicable.

Related Correspondence: **Related Correspondence** are other correspondences that have been entered into the correspondence log that pertains to this correspondence. Only those correspondences that are associated to the current Contract ID can be associated to the correspondence log.

“Right-click” on the **Related Correspondence** field.

“Click” on **Search**.

Corr Srl Nbr	Corr Type	Status	Date	Major Topic
1	Approved Material	R	04/22/05	Shop Drawings for Stell Strain Pole
2	Other	R	04/08/05	Subcontractor Approval
3	Other	R	04/05/05	Subcontractor Approval
4	Other	S	04/22/05	Steel Strain Poles

“Double-click” on the appropriate **Corr Srl Nbr**, if applicable. If there are no previous correspondences logged, this window will be empty.

Contract ID: R-90003 Contract Correspondence Serial Number:

Correspondence Type: Mix Design

Received: On: 12/11/07 Correspondence ID: 041401122D

Sent From: Black Side Up Paving

Sent To: Greenfield District Testing Lab

Document Category: Superpave Mix Design

Document Location: Greenfield

Major Topics: HMA Mix Design
401 25.0mm Base

Related Correspondence: 3 Other:

Required Response Text: Enter appropriate text here.

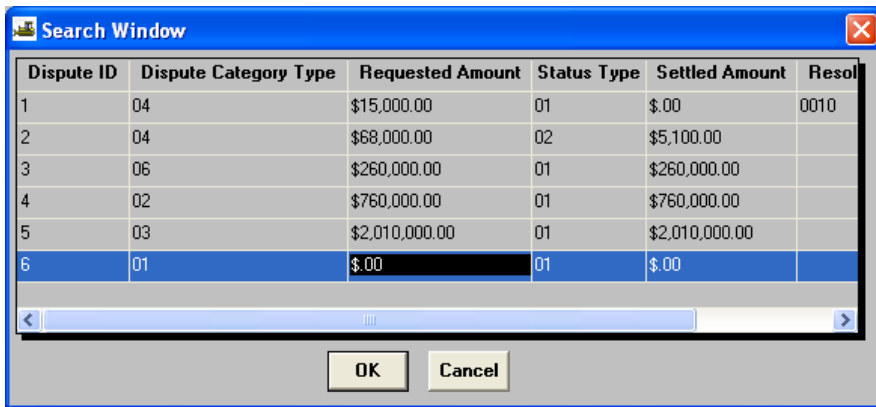
Dispute: 0

Required Response Text: The **Required Response Text** field is not be utilized for MT-DOC correspondences.

Dispute: The **Dispute** field is used to identify the Dispute Case number related to the document when it is part of a contractor claim or dispute.

“Right-click” on the **Dispute** field.

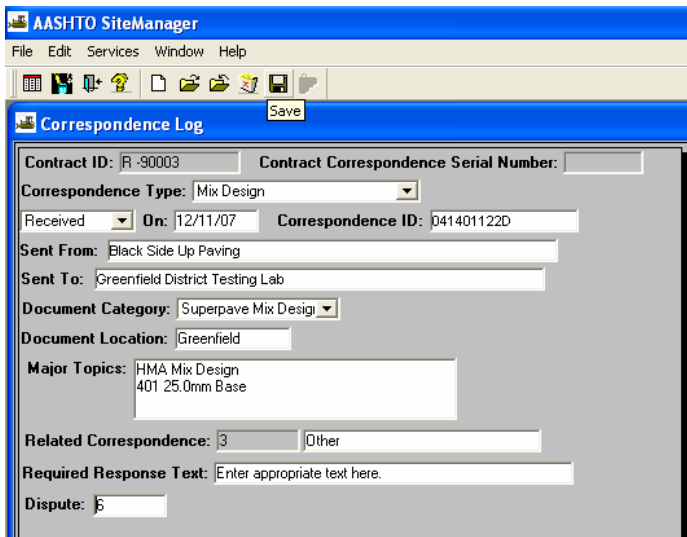
“Click” on **Search**.



A screenshot of a 'Search Window' dialog box. It features a table with six columns: Dispute ID, Dispute Category Type, Requested Amount, Status Type, Settled Amount, and Resol. The table contains six rows of data. Row 6 is highlighted in blue. Below the table is a horizontal scrollbar and two buttons: 'OK' and 'Cancel'.

Dispute ID	Dispute Category Type	Requested Amount	Status Type	Settled Amount	Resol
1	04	\$15,000.00	01	\$.00	0010
2	04	\$68,000.00	02	\$5,100.00	
3	06	\$260,000.00	01	\$260,000.00	
4	02	\$760,000.00	01	\$760,000.00	
5	03	\$2,010,000.00	01	\$2,010,000.00	
6	01	\$.00	01	\$.00	

“Double-click” on the appropriate **Dispute ID**, if applicable. If there are no previous correspondences logged, this window will be empty.



A screenshot of the 'AASHTO SiteManager' software interface, specifically the 'Correspondence Log' window. The window has a menu bar (File, Edit, Services, Window, Help) and a toolbar with various icons, including a 'Save' button. The form contains several fields: 'Contract ID' (R-90003), 'Contract Correspondence Serial Number' (empty), 'Correspondence Type' (Mix Design), 'Received' (12/11/07), 'Correspondence ID' (041401122D), 'Sent From' (Black Side Up Paving), 'Sent To' (Greenfield District Testing Lab), 'Document Category' (Superpave Mix Design), 'Document Location' (Greenfield), 'Major Topics' (HMA Mix Design, 401 25.0mm Base), 'Related Correspondence' (3), 'Other' (empty), 'Required Response Text' (Enter appropriate text here.), and 'Dispute' (5).

“Click” the **Save**  button located on the toolbar

The **Contract Correspondence Serial Number** will automatically be populated.

Refer to training document **A-2-11-2 Attaching a Document** for instruction on attaching a document.

Creating a Correspondence Log

A-1-11-1 Group Exercise

In the following exercise you will complete a correspondence log for PCC Mix Design 043702122P.

Log into SiteManager as update
Password pass

Navigation from **Main Panel:**

Double-click: **Contract Administration (+)** icon

Double-click: **Contract Records (+)** icon

Double-click: **Correspondence Log** icon

Click the **Open** button

Contract ID	Select	<u>MT-DOCS</u>
Corr Srl Nbr	Select	<u>2</u>

Document Category	Select	<u>Concrete Mix Design</u>
Document Location	Enter	<u>Greenfield</u>
Major Topics	Enter	<u>702 Class A Concrete</u>

Click on the **Attachments** button

Click on the **New OLE** button

Click on the **Create From File** tab

Click on the **Browse** button

Locate file named PCC Mix design 043702122P.pdf located in the
C:\SMTRNG\Training Attachments folder

Click the **Open** button.

Click the **OK** button.

Name: "Enter" 043702122

Description: "Enter" 043702122P Concrete Mix Design

"Click" the **Add All** button located at the bottom of the panel.

"Click" the **Add** button located on the bottom of the OLE Attachment window.

"Click" the **Save** button located on the toolbar.

"Click" the **Attachment button** to close this panel

"Click" the **Close** button located on the toolbar.